

WHAT IS CLAIMED IS:

1 1. A method for managing a corporate restructuring of
2 at least two organizations, the method comprising:

3 presenting a user interface including information
4 relating to consolidating customer accounts for at least one
5 of the restructuring organizations; and

6 presenting a template in the user interface, the template
7 including a rollout template menu, a pull down window, a list
8 of action items, and a status relating to each action item in
9 the list.

1 2. The method of Claim 1 wherein the list of action
2 items comprises at least one of an account executive
3 assignment notification, an account executive personalized
4 communication, a customer communication, a cross selling
5 opportunity, and a retention plan, an action including a
6 transmission of an email.

1 3. A method comprising:
2 providing a single logical physically distributed
3 information system across one or more information systems of
4 at least two enterprises being combined; and
5 providing a user interface to allow a user to access the
6 single logical physically distributed information system to
7 execute one or more pre-merger activities, merger activities,

8 and post-merger activities, the merger activities including
9 customer-related integration and resources, the post-merger
10 activities including a post-merger assessment and a
11 measurement of one or more achieved merger synergies.

1 4. The method of claim 3, wherein the merger activities
2 further comprise:

3 providing customer-related communications; and
4 managing and planning customer support activities, the
5 customer support activities including addressing one or more
6 customer issues and concerns.

1 5. The method of Claim 3, wherein the user interfaces
2 are adapted to a role of the user and a phase of the merger,
3 the user role including an executive of one or more customer
4 accounts, a security of the user interface related to the
5 phase of the merger and a role of the user.

1 6. A method comprising:
2 facilitating consolidation of customer-related
3 information for a first organization being merged with a
4 second organization, the customer-related information
5 including customer accounts, the consolidation including
6 matching one or more customer accounts of the organizations;
7 and

8 facilitating consolidation of customer-related
9 assignments of at least one of the organizations.

1 7. The method of Claim 6 further comprising:
2 providing an exception list for non-matched customer
3 accounts; and
4 tracking a status of customer-related engagements.

1 8. A system for managing a merger of at least two
2 organizations, wherein the system comprises a software process
3 and user interface adapted to assist customer satisfaction
4 during a merger period, the software process being stored in a
5 medium.

1 9. The system of Claim 8 further comprising:
2 a first tool adapted to retain one or more customers;
3 a second tool adapted to provide collaborative customer
4 retention planning; and
5 a third tool to provide targeted and personalized
6 electronic mailing to customers of at least one of the
7 organization.

1 10. The system of Claim 9, wherein the second tool is
2 adapted to provide a unified and aligned presentation of
3 customer accounts from one or more merger customer support

4 centers of at least one of the organizations, the presentation
5 including customer records.

1 11. A system for implementing a merger of at least two
2 organizations, the system including a software product adapted
3 to facilitate sales-related activities of the organizations,
4 the software product including a user interface, wherein the
5 sales-related activities include at least one of sales
6 consolidation, cross selling activities, and customer
7 retention of the organizations.

1 12. The system of Claim 11, wherein the user interface
2 presents at least one of a synergy, an expected impact, a
3 realized impact, and a progress of the expected impact, the
4 user interface presents the progress in a graph and at least
5 one of an owner of the synergy, an electronic mailing link,
6 and one or more initiatives related to the synergy.

1 13. The system of Claim 11, wherein the user interface
2 presents information for one or more user-identified cross
3 selling opportunities, the information including a number of
4 matched customer accounts, a status, and a potential value,
5 the potential value associated with an external object.

1 14. The system of Claim 11, wherein the user interface
2 comprises:

3 a first panel adapted to address customer-related issues;
 4 a second panel adapted to address sales-related
 5 initiatives, the second panel including at least one of an
 6 approval button, a rejection button, a checklist of
 7 initiatives, a number of impacted customers, a financial
 8 impact, an initiative owner, and an initiative priority level;
 9 a third panel adapted to facilitate customer retention,
 10 the third panel including a measure of customer retention, one
 11 or more retention rates, and a movement of the one or more
 12 rates;
 13 a fourth panel adapted to facilitate customer retention,
 14 the fourth panel including at least one of a customer
 15 satisfaction rate, a customer survey, and a movement of the
 16 rate, wherein the customer survey comprises one or more
 17 external objects; and
 18 a fifth panel adapted to facilitate a search of
 19 merger information and to facilitate contacting one or more
 20 merger members.

1 15. A system for managing a merger of at least two
 2 organizations, the system comprising a graphical user
 3 interface adapted to allow a user to consolidate customer
 4 accounts for at least one of the organizations, the graphical
 5 user interface further adapted to match customer accounts from
 6 at least two merger organizations.

1 16. The system of Claim 15, wherein the graphical user
2 interface comprises a sorted list of customer accounts, a
3 customer account value, a numerical representation of account
4 ranking, information for at least one customer service
5 personnel from each merger organization, information for a
6 customer service personnel assignment relating to at least one
7 account, the customer service personnel assignment including a
8 cooperative assignment.

1 17. The system of Claim 15, wherein the graphical user
2 interface further comprises information relating non-matched
3 accounts and a clean room tool adapted for at least one
4 stakeholder, the information relating to non-matched accounts
5 including a second list of customer accounts.

1 18. A method for managing a merger of at least two
2 organizations comprising:

3 presenting a user interface including information
4 relating to consolidating accounts for at least one of the
5 merger organizations, the user interface including a pull down
6 window, a text box a trigger date, and a response date; and

7 presenting a template in the user interface, the template
8 including a notification template menu, a list of action
9 items, and an owner relating to each action item in the list.

1 19. The method of Claim 18, wherein the list of action
2 items comprises at least one of an account executive
3 assignment notification, an account executive personalized
4 communication, a customer communication, a cross selling
5 opportunity, and a retention plan, an action item includes
6 transmission of an email.

1 20. The method of Claim 18 further comprising
2 facilitating exception handling for at least one of the action
3 items.

1 21. The method of Claim 18, wherein the user interface
2 further presents at least one of a list and a graph, the graph
3 presents a time period for each listed action.

1 22. A system for managing a merger of at least two
2 organizations comprising a services unification module, the
3 services unification module including one or more user roles,
4 the user roles including at least one of customers, services
5 taskforce members, service representatives, and integration
6 project managers.

1 23. The system of Claim 22, wherein the services
2 unification module comprises one or more inputs, the inputs
3 comprising:

4 a list of customer accounts;

5 a list of products sold to one or more customers;
6 a list of customer-related services;
7 a list of customer-related personnel; and
8 a list of service providers.

1 24. The system of Claim 22, wherein the services
2 unification module further comprises one or more outputs, the
3 outputs comprising:

4 an account services consolidation plan;
5 a merged account repository;
6 a customer communication;
7 a tracking statistic; and
8 a customer-satisfaction statistic.